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## Uncomfortable - Committing to Change - Finding Success

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# **UNCOMFORTABLE—COMMITTING TO CHANGE— FINDING SUCCESS ELLEN SAFLEY**

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## **Abstract**

Academic libraries are challenged to meet the changing demands of higher education and keep pace with technological advances. Often, libraries and collections are bypassed by students using the internet for finding information. Some have seen budgets reduced and space eliminated. Many report dramatic declines in the use of print, in the development and management of their collections, and in the need for traditional reference services. Demand for instruction in classrooms is also declining in many institutions.

The libraries at the University of Texas at Dallas are committed to advancing services and technologies in many ways. This paper will examine how the organization worked to develop a new integrated system and how new services were adapted to complement the early adoption of a new system. Librarians were not always universal in their support of the changes; however, various strategies were used to find good outcomes for each project.

The article will chronicle how a new system was implemented and how the staff adjusted to the changes in most library operations. Secondly, the transition to a new system created opportunities to review most internal workflows and provided the benefit of improving customer services.

**Keywords:** discovery system implementation, technology change in libraries

## **Introduction**

The University of Texas at Dallas was created in 1969 from a research center established by the founders of Texas Instruments. The University has approximately 23,000 students and provides over 130 degree plans including 30 doctoral programs with major concentrations in the natural sciences/mathematics, management, and engineering. The campus prides itself on an interdisciplinary approach. The Eugene McDermott Library is a medium-sized academic library and provides a hybrid model of selection across print and electronic materials. At present, the collection includes access to over 70,000 electronic journals and 1.5 million books/eBooks.

Librarians play a key role in introducing students and faculty to the capability of discovery systems. Discovery systems can influence how librarians find information and how students are taught how to use the collections. The system enables the library to provide easy access to electronic as well as the print resources and is managed by the staff. In addition to traditional materials, the system can search across articles within the journals owned/licensed as well as materials included in a campus institutional repository. The nature of the system can simplify the discovery process in ways similar to major Internet search engines. The discovery system links a customer to the text of an electronic resource or can provide citations to resources not owned by the library.

For many years, public services librarians at the University of Texas at Dallas received customer comments about their ability to use the library catalog. Pressed to make the catalog easier, the Library tested the system with students in a variety of ways (group testing, focus groups, a student advisory board, online courses, and chat services) over a period of years. A long-term standing committee focused on advancing the online public catalog was established with involvement from staff across the library. The librarians attempted to improve the system by reducing jargon, improving performance, and identifying where students were having problems. The draw of using a simpler system was overwhelming to students and they continued to migrate to Google, Google Scholar, and anything that would find them scholarly articles without using the library system or

journal databases. The attraction of the Google interface and functionality is well documented and is nothing new or unique to the University of Texas at Dallas. Library liaisons continued to approach faculty members concerning instruction on the use of the library who insist that students were competent at finding what is needed for an assignment.

In 2009, the Library implemented its first discovery service to expand the usefulness of the catalog. While the discovery layer provided access to a large variety of materials, it did not update in real time. Since the integrated library system and the discovery layer were products from competing vendors, it took more than 24 hours to determine if an item was checked out. The Library was approached by Ex Libris in 2011 to become an early adopter of their ALMA system, a major rewrite of the staff side of Voyager. The Library was continually concerned about maintaining servers on campus and to give the equipment the attention it needed. ALMA moves the system into cloud computing and considered less staff intensive. As part of the ALMA implementation, the Library had to adopt Primo, the public interface of their discovery system. Since Primo was considered a mature product, the migration to the new Ex Libris system was initiated. A presentation on ALMA and Primo by the vendor was acceptable by staff members.

### Analysis

The implementation of a new integrated system can be critical to any library but especially when the product is not fully formed. Since the ALMA product had been in the initial stages of development and was being released over a period of years to early adopters, staff members were responsible for initiating how the system should be developed and improved based on current needs. The process of submitting changes to the system was not maximized by the library. It was assumed from the beginning that the system was more mature than realized. Every month, Ex Libris released enhancements which addressed problems but not necessarily the challenges submitted by the staff. Because of the nature of the development, it was confusing and frustrating for staff members who had submitted problems but which were not addressed. The enhancement process was different in that sometimes elements of the system which were working one day were not working after an upgrade.

Staff members were recently asked to complete a survey comparing their experiences with the current and previous systems. Data was collected on what aspects of the new system were easier than the previous system as well as what was particularly difficult with the transition. Each employee experienced a variety of challenges with implementing their specific modules. In addition, they were questioned about ongoing problems.

It is apparent that some departments were largely uncomfortable with the timetable set for the implementation. Looking back at the process, many staff members indicated that the training should have been expanded before going live with ALMA/Primo but the date was set by Ex Libris to coincide with the beginning of a semester and budget year. The lack of hands-on training for Technical Services and Circulation staff was a major concern but the groups addressed it differently. The Metadata Services and Acquisitions units attended a variety of webinars and then analyzed workflow issues which resulted in very positive results. The team approach and a commitment to improving the system created a motivated, knowledgeable staff. At times, the staff was tasked in making the system work. As ALMA has matured, the initial problems with the system and within workflows were mostly resolved resulting in smooth operations. Editing individual or small sets of bibliographic records is more labor intensive than in Voyager; however, the loading and editing of large batches of records is far superior than in the past. The loading of batch records will be common in the future. In contrast, Circulation staff attended training provided by Ex Libris but was stressed by the lack of testing before the "go live" date. Unlike some departments, the Circulation staff is extremely positive despite the initial training. The memories of the first weeks after implementation have been replaced by the recognition of the improvements over Voyager. And, the development of the system due to the submission process has been successful. The Interlibrary Loan and Reserves units also experienced problems with implementing their services within the ALMA/Primo system. Some of the problems were resolved over time but some issues continue and complicate the workflows.

The Primo interface was designed to showcase electronic resources rather than print materials. The Reference and Instruction staffs were confronted with search functionality and display issues. One additional challenge was that as the ALMA implementation progressed the Primo interface changed. These departments were certainly more frustrated and continue to be critical of the system. The implementation of a discovery layer is not universally accepted by the staff. The statistics on the use of the article knowledge base continue to expand as a percentage of the use of the entire system.

It is clear that the Primo interface remains a major problem. A team of representatives from a variety of departments was created and charged with determining how to improve Primo and for setting a priority for working on the issues. The Primo team initially created a list of over 50 features which were either wanted for better functionality or not working as desired. The list was created by looking at other Primo/ALMA sites, by reviewing only Primo sites, or through experience with the previous system. The Team overhauled every part of the search engine including the display of all parts of the bibliographic record and the naming and location of the facets and all field labels. Many aspects of the out-of-the-box display were eliminated. The Team worked closely with the support team at Ex Libris. The library found the discovery sites of early developers of ALMA especially useful and contacted appropriate staff members at other libraries. The list of issues has been reduced by half but major concerns still exist.

Primo is still cited by Public Services staff as a major concern. Most employees cite that Primo is better now than in the beginning of the transition. Primo requires multiple steps in searching that were not necessary in previous systems. Various fields within bibliographic records were not included in the initial display and special attention has been given to correcting this issue. The Instruction Team was very useful and positive about the system as they quickly become knowledgeable about how the system was used. Given that the Library teaches many online classes, the Instruction group was able to give specific examples of problems that could receive attention.

Library staff members had never been involved with the development of an integrated system and other types of issues were unforeseen. Data migration was one challenge. Many holdings statements did not migrate. The cumulative holdings statement was available for some titles but completely absent for others. The holdings issue created a major project for staff to enter information from the previous system which was still available in the early parts of implementation. Secondly, item records were not displayed in chronological order. The issue is very disruptive to public service units causing challenging attitudes toward the new system.

The gradual development of the system provided opportunities to expand other elements within the library. The search for new features within catalog and discovery systems resulted in finding tools to expand library services. For over 5 years, the University of Texas System had worked together to provide a multi-institutional chat service which was supported by a grant. With the end of the funding, the service was terminated. The University of Texas at San Antonio implemented a chat service called Zopim, customer service software not developed in libraries. An investigation of this chat service resulted in licensing the software for the University of Texas at Dallas. This new service provided a mechanism for students and faculty to ask questions about the library and the new system privately. While the library did not market the chat service to assist with the new system, questions about the library and how to find information were common. The chat service has been overwhelmingly positive as demonstrated by surveys attached to the end of each chat session. During the spring semester of 2015, the library expanded its hours to 24/5 plus weekends. Extended hours staff assisted with some chats. With future professional staffing, the service will be extended. As approximately half of the questions involve circulation and Interlibrary Loan, the new service provided further support for the new catalog and discovery system. Finding a new option for chat services would not have occurred without the efforts of searching library websites for enhancements to ALMA/Primo.

The implementation of the new system within Interlibrary Loan unit was very frustrating on two fronts: holdings migration and interactions between the primary ILL software and ALMA. Given the

challenges the two issues created, the Library determined that the implementation of the RAPID system generated by Colorado State University would create a different challenge for the Unit. RAPID enables the University to connect with major research libraries which expedite the delivery of journal articles not available on campus. The system has received strong positive support from across the campus and was able to provide a good experience for the Unit. In addition to the holdings issues, the Library made the decision not to implement the resource sharing component within ALMA as it was not fully formed at the time of our system launch. The resource sharing component eliminates the need for Interlibrary Loan staff to enter data into ALMA on borrowed books thereby eliminating a major workload. The resource sharing component is scheduled for installation during the summer of 2015 and has the potential of eliminating some major negative attitudes by the Interlibrary Loan unit. The librarian for that unit was able to see the positive changes the component would create by attending a national meeting which provided a session on the resource sharing implementation at another library. These enhancements cannot occur soon enough and it is hoped that the staff will begin to see the benefits of the new system.

Another major component which was particularly difficult for the migration was the reserves module. In the early stages of implementation, the Reserves staff was unable to publish records to ALMA/Primo. This problem resulted in a serious gap in the ability to find reserve readings within the new system. As the go live date was at the very beginning of a semester, the staff was very uncomfortable with this failure. After a series of weeks and with the assistance of the Ex Libris staff, Reserves became operational and is now vastly improved. While the staff remains critical of the system indicating that it is not as friendly to use as Voyager, most of the problems are resolved. The staff went from uncomfortable to having an attitude of making the new system work.

The new system created some concerns for the Instruction unit. The Unit had to change all aspects of how they taught the system. All handouts and YouTube videos had to be created for the new system. In addition as the system changed, the materials had to be updated. The Unit also had to determine how to best teach the new system to students while keeping a positive attitude about the system. The librarians have remained mostly positive about the development of the system and are active participants in the team reviewing enhancements to Primo.

Secondly, all guides created from Lib Guides software (by Springshare) were no longer useful as they were created for the old system. For example, new links to all titles were required. A permanent linking option within the catalog was not readily available for a few months after the launch of the new system. The demand to update the LibGuides created an opportunity for the library selectors/liaisons to overhaul the guides. This update coincided with the release of a new version of LibGuides software. While the timetable of the update was expedited because of the new system, the selectors were encouraged to update the information provided on a regular basis. The challenge of updating the guides provides better service to customers.

The selection of materials for the library was largely unchanged by the implementation of the new system. Selectors generally use the system to determine what is owned/licensed by the library, but they still request materials through the YBP GOBI system as well as sending information directly to the Acquisitions Unit. However, the selection of large quantities of eBooks, subject specific eBook collections, bibliographic records of database contents, and record sets for demand driven acquisitions projects are enhanced prior to loading and are batch loaded more effectively. As more resources are loaded in this way, the processing of resources is more efficient.

## Conclusions

The library entered into a process of development and adopting a new catalog/discovery system based on a combination of concerns. The reasons included moving into cloud computing to reduce the need for campus support, creating an easier system for students to find relevant materials, and streamlining of record manipulation for large electronic collections. The cloud computing concern is fulfilled. The result is a system which requires fewer campus resources for equipment and staffing. The negative aspects are that the update to the contents is not always instantly available and can take 24-48 hours to post. The public services staff continues to work on the Primo interface but

most agree that it is not easier to use than Voyager. This fact is that Voyager was not a discovery layer and the addition of journal articles and objects from a repository expand the range of the information delivery beyond what was previously included. The idea of searching across the resources can be very intimidating given the volume of resources available. Finally, the Technical Services staff is remarkably thrilled by the ability to load and manipulate records. These librarians are actively manipulating records to correct multiple problems which would have never been possible with Voyager. The system is not ideal but Ex Libris continues to enhance it in ways which benefit their Primo/ALMA community.

It is important that the ALMA/Primo community continues to work together to make the system stronger. Libraries entering into the community already have the benefit of the last couple of years of development. Some of the libraries entering the community are larger and more complicated. This fact will further the complexity and development of the system.

Update announcements about enhancements are sent from Systems staff to all library employees. Each month the announcements report what progress has been made in the new system. Through the writing of this article and the survey which was administered to the staff about the new system, it is clear that the update should take a different form in order to make staff aware of changes that could potentially resolve challenges with the system. The updates are often too long for most staff to ingest. Travel to conferences concentrating on the design and implement of projects within the new system is essential for developing the skills of the local staff and the development of the local iteration of the system.

The staff commitment to the new system provides some insight into finding success. After nearly two years, the uncomfortable phase of the project is largely gone and most employees are working to improve their workflows. The new system was challenging for all staff. Many employees adapted more quickly than others. That positive adaption and their attitudes coincided with their specific workflow. Staff members discovered strengths in the new system if they found new ways to do a task rather than trying to find the same elements used in the previous system. The experiences at University of Texas at Dallas are unique and are based on the size of the library and the staff devoted to the project. At a recent conference sponsored by Ex Libris, the company announced that the Primo system would be reworked during 2016-2017. It is hoped that the system will be easier to use for both librarians and students.